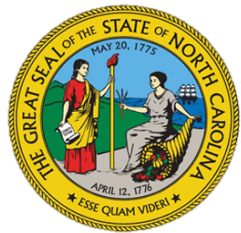# North Carolina COVID-19 Vaccine Management System

CVMS Provider Portal Receiving & Processing Vaccine Shipments User Guide

Version 5

January 14, 2020

NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**

If you have any questions, issues or requests, please go to the CVMS Help Desk Portal* at
https://ncgov.servicenowservices.com/csm_vaccine

* On the home page of the CVMS Help Desk Portal, select the "**Vaccine Provider**" option to submit your question, issue, or request.

Providers that are first time users of the CVMS Help Desk Portal will have to follow the steps below:

1. Register for an account on the portal by clicking 'Register' in the top right-hand corner

2. Populate your first name, last name, business e-mail, and your registration code

    NOTE: The registration code is your Provider PIN (i.e., NCA650001), which can be found on the packing lists received with your Vaccines For Children shipments, or in the top right-hand corner of a wasted / expired report generated from the North Carolina Immunization Registry (please add "NCA" to the front of the six-digit PIN#)

    For providers who are not enrolled or may not have a Provider PIN, you may use the following generic Provider PIN to register: VAC2021

3. You will receive an e-mail with your username and temporary password to log into the portal
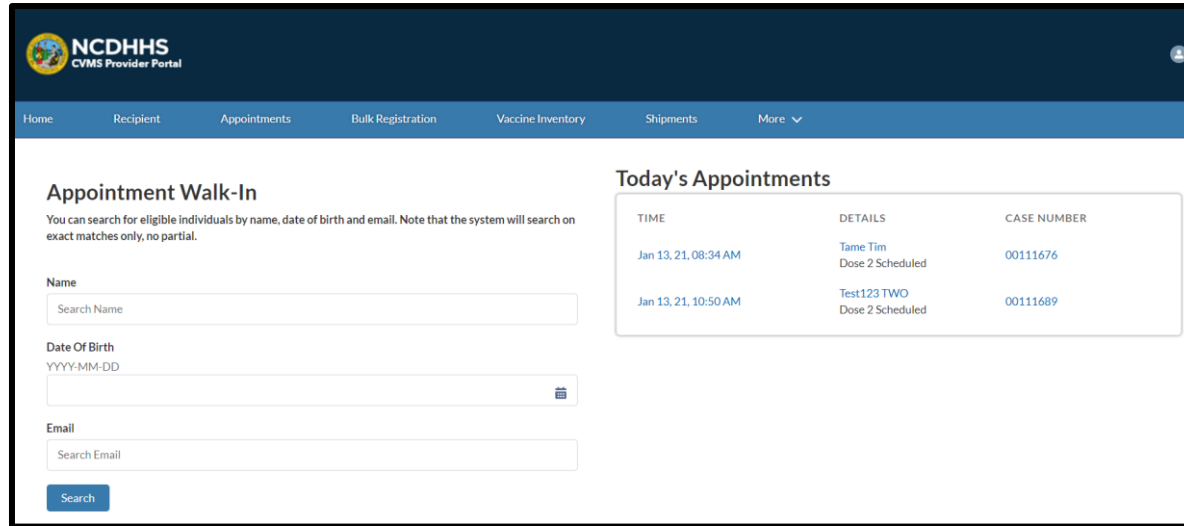
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COVID-19 Vaccine Inventory Management Overview
Process Overview

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Overview

Receiving and processing COVID-19 vaccine Inventory shipments typically involves:

1. Reviewing the Vaccine Inventory Shipment record

2. Adding Vaccine Inventory

3. Adding inbound COVID-19 vaccine transfers

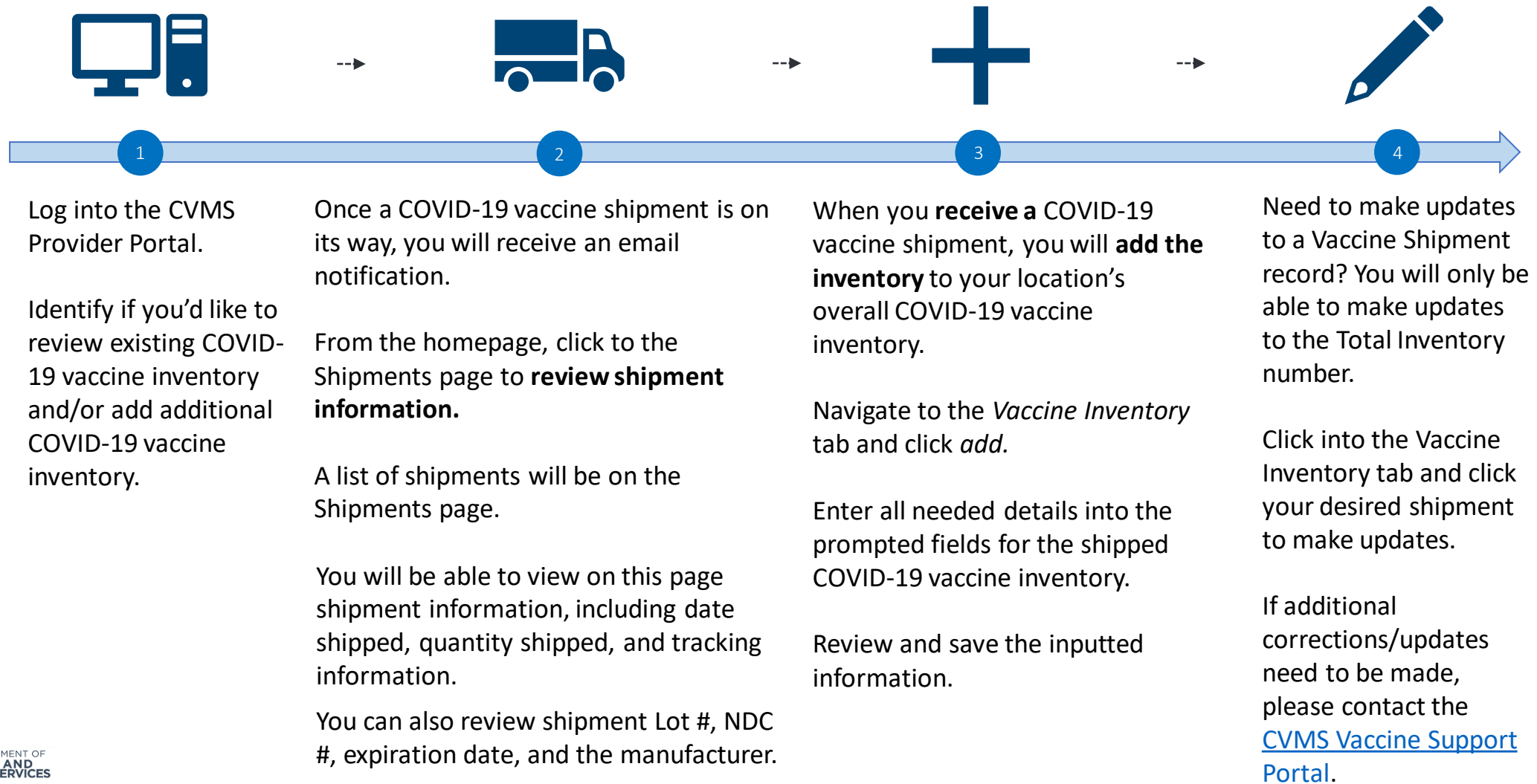The processes included in this training are for **Healthcare Location Managers.**

Additionally, you will need to:

• Use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers

• Log into the CVMS Provider Portal at https://covid-vaccine-provider-portal.ncdhhs.gov

Now, let's get started!

COVID-19 Vaccine Inventory Process Overview (Receiving)

What should you do to properly track and report receiving COVID-19 vaccine Inventory in the CVMS Provider Portal?

1

Log into the CVMS Provider Portal.

Identify if you'd like to review existing COVID-19 vaccine inventory and/or add additional COVID-19 vaccine inventory.

2

Once a COVID-19 vaccine shipment is on its way, you will receive an email notification.

From the homepage, click to the Shipments page to **review shipment information.**

A list of shipments will be on the Shipments page.

You will be able to view on this page shipment information, including date shipped, quantity shipped, and tracking information.

You can also review shipment Lot #, NDC #, expiration date, and the manufacturer.

3

When you **receive a** COVID-19 vaccine shipment, you will **add the inventory** to your location's overall COVID-19 vaccine inventory.

Navigate to the *Vaccine Inventory* tab and click *add.*

Enter all needed details into the prompted fields for the shipped COVID-19 vaccine inventory.

Review and save the inputted information.

4

Need to make updates to a Vaccine Shipment record? You will only be able to make updates to the Total Inventory number.

Click into the Vaccine Inventory tab and click your desired shipment to make updates.

If additional corrections/updates need to be made, please contact the CVMS Vaccine Support Portal.

Key Terms

Wastage	Vaccine Wastage is the sum of COVID-19 vaccines discarded, lost, damaged or destroyed.
Returns / Spoilage	Vaccine Spoilage happens when a COVID-19 vaccine dose is no longer eligible for administration to an individual due to exposure to inappropriate conditions.
Vaccine Deprecation	Vaccine Deprecation represents the process in which the amount of COVID-19 vaccines are reduced by the amount of COVID-19 vaccines administrated, wasted or returned.
Vaccine Inventory Shipment details	Vaccine Inventory Shipment Details may include lot number, serial number, and national drug code (NDC).

COVID-19 Vaccine Shipment Notification

Step 1 of 4: Navigate to Shipments

It is important to maintain accurate COVID-19 vaccine inventory levels for the location(s) that you support to remain in alignment with the CDC's COVID-19 vaccine guidelines. Once a COVID-19 vaccine Inventory shipment is on its way, a **VACCINE SHIPMENT RECORD** will be available for you to review in your **SHIPMENTS TAB**.

You will also receive an **EMAIL NOTIFICATION** when a **VACCINE INVENTORY SHIPMENT** is on its way to your location.

1. At the top of your home page, locate the **SHIPMENTS TAB**

2. Click **SHIPMENTS**

3. After clicking **SHIPMENTS**, you will be directed to the **SHIPMENTS PAGE**
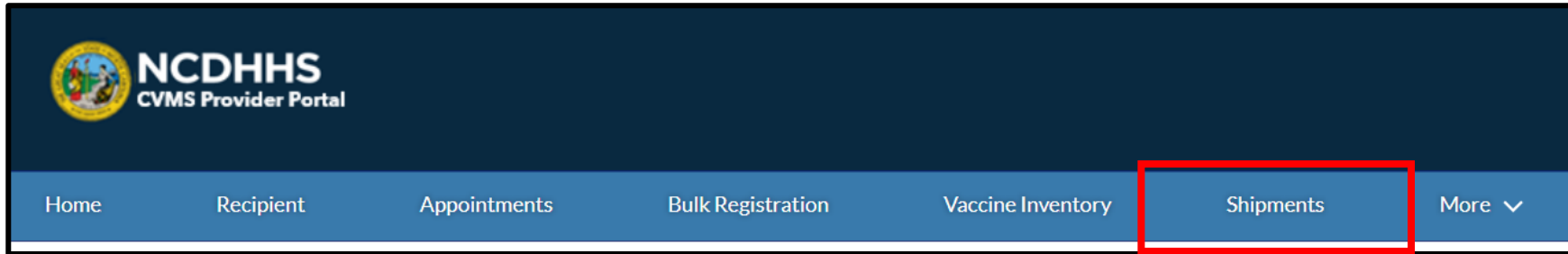
Audience

> Healthcare Location Manager

Tips

You will be notified when a COVID-19 vaccine shipment is on its way.

Step 2 of 4: Switch Shipment Record List Views

You will see a **LIST VIEW** on your page. A list view is a **SUMMARY OF YOUR RECORDS**. By default, you may be directed to the Recently Viewed List View. To see all your Shipment Records, you will have to switch to the All Shipment Records list view. You will be able to switch back and forth between list views.

1. Click the **DROP-DOWN MENU** next to the list view name

2. Click **ALL SHIPMENTS**

3. If you want to make your selection your default list view, click the **THUMBNAIL ICON**
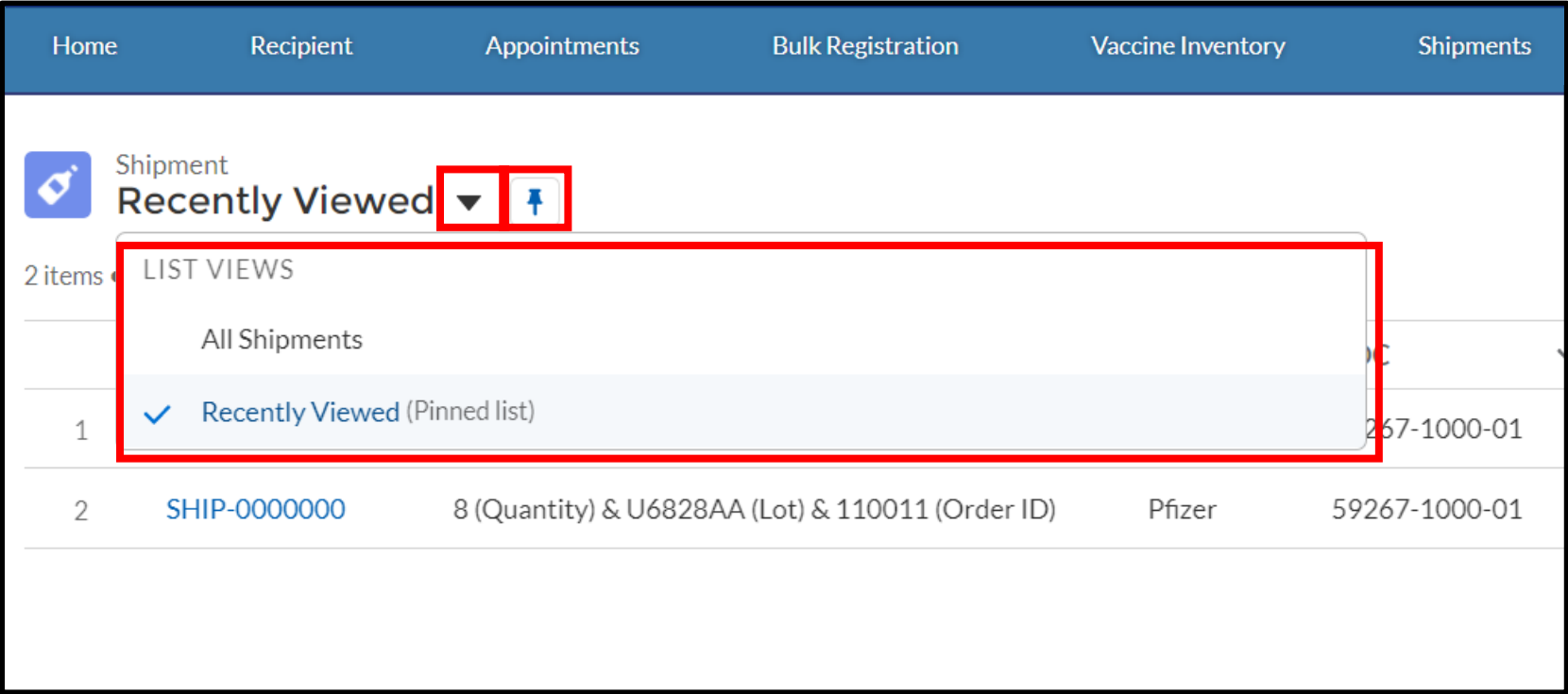
Audience

> **Healthcare Location Manager**

Tips

By Default, the view is set as "Recently Viewed", therefore the list will seem empty at first.

Change the view to "All Shipments" and click the THUMBNAIL icon to PIN your favorite list view.

Step 3 of 4: Navigate to the Shipment Record

On this page, you will see a list of Vaccine Shipment records for the location(s) you support. The **VACCINE SHIPMENT RECORD** will be **RELATED** to an **ORDER RECORD.** This means that your Vaccine Shipment record will always be associated to a specific order.

1. Locate the **SHIPMENT ID**

2. Click the **SHIPMENT ID HYPERLINK**

3. You will be directed to the **VACCINE SHIPMENT RECORD**

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Tips

You can use the SEARCH BAR to search for a record. Clicking on column header will sort by the column.

For example, you may choose to sort by SHIPMENT DATE.

Step 4 of 4: Navigate to the Shipment Details

Home	Recipient	Appointments	Bulk Registration	Vaccine Inventory	Shipments	More ∨

Shipment
SHIP-0000013

RELATED   **DETAILS**

∨ Information

Shipment ID
SHIP-0000013

Email Sent to Primary Location Coord
☑

∨ VTrcks Shipping File

Delivery Number ⓘ	Quantity Requested ⓘ
12345654	150
Delivery Line Number	Lot Number ⓘ
1	564645
Date Shipped ⓘ	Lot Expiration Date ⓘ
20201204	20211209
ExIS Order Line Number ⓘ	Quantity Shipped ⓘ
1	140
ExIS Order ID ⓘ	Unit of Measure ⓘ
110022	DOS
ExIS Order Date ⓘ	Order Line Fulfilled ⓘ
20201204	Y
VTrckS Order Number ⓘ	Order Line Split Indicator
57575	N

On the Shipment record, you will be able to **REVIEW DETAILS** about your expected order including:

- Date Shipped

- Quantity Shipped

- Tracking Information

- Lot #

- NDC #

- Expiration Date

- Manufacturer

1. On the Shipment record, click on the **DETAILS TAB**

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Tips

Review specific details about your order.

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COVID-19 Vaccine Shipment Email Notification

Primary Vaccine Coordinators will be notified via **EMAIL** if a **VACCINE SHIPMENT** has been processed for location(s) they support. You can expect the email to come from the **CVMS Support Team**.

You will receive an email notification for each shipment **BY VACCINE TYPE**. Details in the email will include:

- Date Shipped

- Quantity Shipped

- Manufacturer

- NDC Number

- Lot Number

- ExIS Order Number

- Carrier

- Shipment Tracking Number

Note: Email will come from nccvms@dhhs.nc.gov

Hello Erin Koontz,

Please see below for details of a COVID-19 vaccine shipment that is on its way to your location.

Vaccine Details:

- **Date Shipped:** 12/02/2020
- **Quantity Shipped:** 3,900
- **Manufacturer:** Pfizer
- **NDC:** 59267-1000-2
- **Lot Number:** U682A06
- **ExIS Order ID:** 500006

Shipment Tracking Information:

- **Carrier:** FDX1
- **Shipment Tracking Number:** 30005

If you have any questions, please email COVIDhelp@dhhs.nc.gov.

Thank you, NC Department of Health and Human Services

Division of Public Health

Immunization Branch

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Update: The email COVIDhelp@dhhs.nc.gov mentioned in this screenshot is now retired. Please contact the CVMS Help Desk Portal with any questions!

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Adding COVID-19 Vaccine Inventory

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Step 1 of 6: Navigate to the Vaccine Inventory tab

When you **PHYSICALLY RECEIVE** a COVID-19 vaccine Inventory shipment, you will want to **ADD THE INVENTORY** to your location's overall COVID-19 vaccine inventory. Processing your COVID-19 vaccine shipments correctly will ensure that your COVID-19 vaccine levels are accurate for your reporting.

*This process **DOES NOT** include processing inbound COVID-19 vaccine inventory transfers. Please see the next section for steps on how to process inbound transfers.*

1. At the top of your home page, locate the tab **VACCINE INVENTORY**
2. Click **VACCINE INVENTORY**
3. After clicking **VACCINE INVENTORY**, you will be directed to the **VACCINE INVENTORY TAB**

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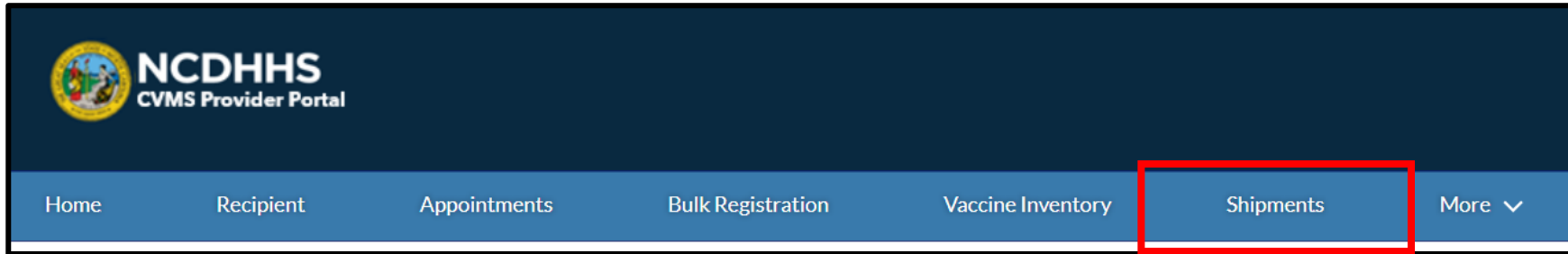
At the top of the page, you will see the different actions you can take to manage your COVID-19 vaccine inventory. This will be your main working page for ensuring that your inventory levels are accurate. See the **VACCINE INVENTORY WASTAGE, RETURNS & TRANSFERS TRAINING GUIDE** to learn more about COVID-19 vaccine Wastage, Returns and redistribution / transfers.

1. Click **ADD**

2. After clicking add, you will be prompted to **PROVIDE ADDITIONAL VACCINE DETAILS**

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Tips

You can use the SEARCH BAR in the All Vaccine Inventories List View to search for a record.

Clicking on COLUMN HEADER will sort by the column.

By Default, the view is set as "Recently Viewed", therefore the list will seem empty at first.

Change the view to "All Vaccine Inventories" and click the THUMBNAIL icon to PIN your favorite list view.

Step 3 of 6: Enter Vaccine Inventory Information

The **NEW VACCINE INVENTORY PAGE** will appear.

To search for a picklist value, you need to enter at least **THREE CHARACTERS.**

1. Populate all required **VACCINE INVENTORY FIELDS**

   - Product

   - Total Doses

   - Lot #

   - Vaccine Inventory Name *(editable)*

   - Serial Number (*not required field in the event you cannot locate it*)

   - Expiration Date

   - Account (when entering your account in the Account field, do not select New Account, start typing your location and it should appear)

2. Continue to **SHIPMENT DETAILS**

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Tips

When adding Inventory into CVMS, we recommend including the Lot #'s in the Inventory Name to help staff that are administering vaccines to recipients to more easily choose the correct Inventory record.

Shipments from DIFFERENT LOT NUMBERS must be entered as separate Inventory records.

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Step 4 of 6: Enter Dosage & Shipment Details

You can now enter the remaining Vaccine Shipment record details.

Do **NOT** reduce the **TOTAL DOSES AMOUNT** if you have wastage, spoilage, or plan to redistribute inventory.

This process **MUST** be recorded separately as **INVENTORY DEPRECATION**.

1. Select a **SHIPMENT RECORD**

2. If you cannot locate the Shipment record, **CHECK** the **UNABLE TO LOCATE SHIPMENT RECORD** box

3. Before saving, **REVIEW** all entered details

4. Click **SAVE**

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Tips

You may click SAVE & NEW to process / add additional Vaccine Inventory records.

Step 5 of 6: Review the Vaccine Inventory Record

After clicking save, you will be directed to the **VACCINE INVENTORY RECORD**. Your COVID-19 vaccine inventory has now been updated to reflect this additional inventory.

At the top of the record, your **VACCINE INVENTORY HIGHLIGHT PANEL** will reflect ongoing **DOSAGE ACTIVITY** for this inventory.

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Tips

Review the Highlight Panel at the top of the Vaccine Inventory record.

Step 6 of 6: Switch Inventory List Views

You will see a **LIST VIEW** on the vaccine inventory page. A list view is a **SUMMARY OF YOUR RECORDS**. By default, you may be directed to the Recently Viewed List View. To see all your Inventory Records, you will have to switch to the All Vaccine Inventory Records list view. You will be able to switch back and forth between list views.

1. Click the **DROP-DOWN MENU** next to the list view name

2. Click **ALL VACCINE INVENTORIES**

3. If you want to make your selection your default list view, click the **THUMBNAIL ICON**

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Tips

Click the THUMBNAIL icon to PIN your favorite list view.

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Accessing Your Account (Location) Details

Your Account (Location) Details page is where you can view all of your account information, Vaccine Inventory, and contact information.

1. Click on **VACCINE INVENTORY** tab
2. Click the **ACCOUNT (LOCATION) NAME**

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Reviewing Account Vaccine Inventory

From your Account's Details page, you are able to see a breakdown of the **ACCOUNT INFORMATION**, **INVENTORY DETAILS (RECEIVED / ON-HAND INVENTORY)**, and **ADDRESS INFORMATION**. The vaccine inventory numbers at the top of the screen will provide a quick total view of **TOTAL DOSES RECEIVED**, **DOSES AVAILABLE**, and **DOSES ADMINISTERED** for your location.

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Tips

Click the arrow to hide or show the detailed information for each section.

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Receiving a COVID-19 Vaccine Transfer

Step 1 of 4: Processing an Inbound Transfer

If you are **RECEIVING** an **INBOUND TRANSFER** from another location, you will want to review the inbound transfer page to stay up-to-date. When you receive the inbound transfer, you will be able to **PROCESS THE INVENTORY** via the **INBOUND TRANSFER PAGE**.

You **DO NOT** process inbound transfers from the **ADD INVENTORY PROCESS**.

1. From the home page, click **VACCINE INVENTORY**

2. Click **INBOUND TRANSFER**

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Tips

Inbound transfer is not processed from the Add Inventory Process.

Step 2 of 4: Select the Vaccine Inventory Record

On the **INBOUND TRANSFER PAGE**, you will see **VACCINE INVENTORY** records that are incoming transfers to your location. You will be able to select the inbound transfer you are ready to process and add it to your inventory.

1. Select the correct **VACCINE INVENTORY** record

2. Click **NEXT**

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Tips

Only Inbound Transfers will be listed.

Step 3 of 4: Complete the Inbound Transfer form

Once you select the correct Vaccine Inventory record, you will see the Vaccine Inventory record details pre-populated. You will want to provide the **DOSES RECEIVED** and **DATE RECEIVED**.

After clicking next, your inventory levels will update, and the inbound transfer is now processed.

1. Enter the **DATE RECEIVED**

2. Enter the **DOSES RECEIVED**

3. Click **NEXT**

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Tips

Identify doses received and date received for the Vaccine Inventory.

Step 4 of 4: Complete the Inbound Transfer form

After clicking next, your inbound transfer is processed and added to your inventory.

1. Click **FINISH**

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Tips

Complete the inbound
transfer form.

# Updating Vaccine Inventory Record Details

Step 1 of 3: Navigate to the Vaccine Inventory tab

You will **ONLY** be able to update the **VACCINE INVENTORY NAME** on the Vaccine Inventory record. It will be very important to ensure accurate data entry when processing a new COVID-19 vaccine inventory shipment.

If you need to make **ADDITIONAL CORRECTIONS** to the Vaccine Inventory record, you will need to contact the **CVMS HELPDESK**.

The CVMS helpdesk can be reached at https://ncgov.servicenowservices.com/csm_vaccine*.*

1. At the top of your home page, locate the **VACCINE INVENTORY** tab
2. Click **VACCINE INVENTORY**
3. After clicking **VACCINE INVENTORY**, you will be directed to the **VACCINE INVENTORY TAB**
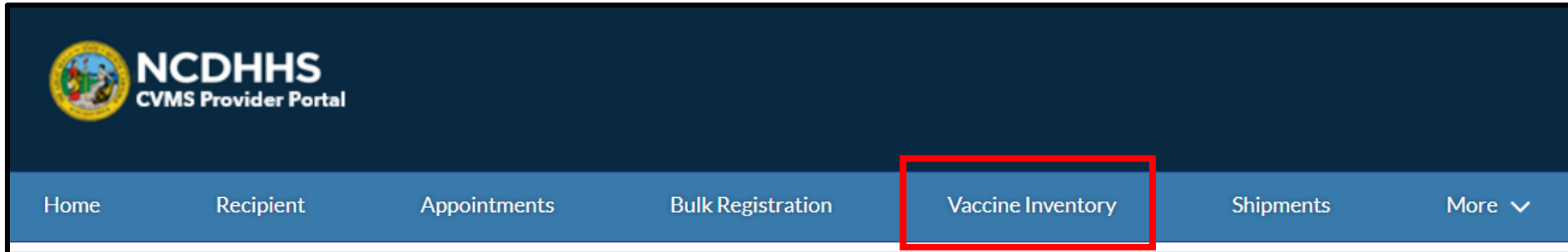
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Tips

COVID-19 vaccine quantity will change through other actions, such as administration, wastage events, returns, or redistributions/transfers.

See CVMS Provider Portal Updating Dose Inventory Quantities Job Aid for instructions on how to adjust the total doses of an inventory record to account for additional doses administered beyond the manufacturers listed available doses per vial.

Step 2 of 3: Navigate to Vaccine Inventory Record

Use the All Vaccine Inventories List View to locate the specific record you need to update. You can **SEARCH or SORT** in the list view.

1. Identify the **VACCINE INVENTORY RECORD** that you wish to update

2. Click the **VACCINE INVENTORY NAME HYPERLINK**

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Tips

You can select the drop-down LIST VIEW MENU to see your RECENTLY VIEWED Vaccine Inventory records.

Step 3 of 3: Update the Vaccine Inventory Record

Before you edit, make sure you are on the appropriate record.

Remember, you must always save your changes.

1. Click the **EDIT BUTTON** on the right-hand side

2. Locate **VACCINE INVENTORY NAME**

3. Update the field

4. Click **SAVE**

5. If the field does not update, click **REFRESH** and try again

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Tips

Identify Vaccine Inventory name.

Appendix

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Additional Notes

Key Items:

- **Hyperlink**s appear as light blue and will provide additional information or navigation.

- *** Asterisks** are used to denote required information.

- A Toggle can be clicked to see selectable options.

- A Pen can be clicked to make edits to the field.

- Previous | Next Navigation Buttons can be clicked on to progress to the "next" or the "previous" step in a task.

- Pause A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your

   previously entered data upon your return/ login.

Contact Information:
- All questions should be directed to https://ncgov.servicenowservices.com/csm_vaccine.

Supported Web Browsers:
- Please use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers to access CVMS.
- For more information on supported browsers, see **https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5**
- Note: Internet Explorer and Edge (Non-Chromium) are not supported.

User Guide Change Log

Key Items:

- **Date of Change:** Date that any updates were made to the User Guide
- **Changes Made:** Summary of the updates made within the User Guide
- **Impacted Slides:** Specific slides that were updated or changed
- **Author:** The user that made the updates to the User Guide

Version	Date of Change	Changes Made	Impacted Slides	Author
1	12/10/2020	• Original version		Azalea Troche
2	12/21/2020	• Updated shipment email notification • New slides on List Views and Account (Location) Record	• 12 • 10, 20, 21, 22	Nicholas Rinz
3	12/31/2020	• Tips on adding inventories	• 10, 16, 17	Simon Couderc
4	1/10/2021	• Removed any mention of the 2 CVMS Help Desk emails. Added Service Now Portal information.	• 1, 2, 6, 13, 29, 30	Courtney Seward
5	1/14/2021	• Updated navigation bar	NA	Azalea Troche